*iSG Provider Lens™

2022

Future of Work – Services and Solutions 2022 - U.S. Public Sector

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ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.

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Definition

This ISG Provider Lens™ Future of Work 2022 study offers IT buyers and decision-makers objective guidance on providers identified as Leaders, Rising Stars and Contenders, with experience in developing, selling and supporting digital workplace services for public sector entities in the U.S. Their services include strategic workplace transformation services, managed services to enable and support the digital environments of end users, and digital service desk and support services for workers and constituents being served.

As new digital business realities emerge and are increasingly disruptive, public sector organizations face tremendous pressure to improve how they operate to reduce costs, and to modernize overall – all in an environment of reduced funds and diminished staffing. Their IT needs and challenges are similar to those of complex commercial enterprises, but, typically, with more restrictive acquisition, staffing, management, reporting and operational requirements. Objective insights, assessments and guidance are more valuable than ever to these organizations.

ISG's U.S. Public Sector advisory and consulting teams use these reports to help clients understand providers' capabilities and offerings suitable for their requirements. These studies also serve as competitive enablement and support for vendor and provider positioning, key relationships and go-to-market considerations.

The ISG Provider Lens™ study offers IT decision-makers the following:

- Transparency on the strengths and weaknesses of relevant providers

- A differentiated positioning of providers by segments

- A perspective on different markets, including Australia, Brazil, Europe and the U.S.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential new engagements.

Introduction

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers;

- A differentiated positioning of providers by segments;

- Insights and guidance specific to the U.S. public sector. ISG's U.S. Public sector coverage includes state and municipal government agencies; public health, education, and utility organizations; and non-governmental/ community service organizations (NGOs). ISG does not currently include the U.S. federal government in the scope of this study.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.

Quadrant Research

This ISG Provider Lens™ quadrant study includes the following four quadrants on Future of Work - Services and Solutions:

Future of Work – Services and Solutions 2022 - U.S. Public Sector		
Services	Workplace Strategy Transformation Services		
	Managed Workplace Services – End User Technology	Digital Service Desk and Workplace Support Services	Managed Employee Experience Services

Workplace Strategy Transformation Services

This quadrant evaluates providers that offer transformation-oriented consulting services for the future of work. They offer workplace strategy formulation, design the post-pandemic workplace architecture and help create roadmaps for the required transformation. These services are an essential part of their digital workplace offerings and are provided independently of the associated technology and managed services. These providers also assist clients in transforming their business and operating model and enable the desired organizational changes.

Eligibility criteria

- Providers should have a vendor-neutral approach toward transformation consulting and workplace assessment services. An ability to provide associated managed or implementation/integration services can be a value add, but is not a requirement

- Providers should be able to define and visualize clients' future of work environment, covering areas such as hybrid working, involving remote and in-office workers; uberization of the workforce; innovative talent models; cultural adaptation; employee engagement; productivity; changing customer experience (CX); and associating CX with employee experience (EX), while also enhancing end-user experience

- Providers should offer technology adoption and organizational change management/behavior management services through their consulting portfolio

- Providers should offer solutions to address employee empathy and well-being

Managed Workplace Services – End User Technology

This quadrant assesses service providers that offer managed services associated with end-user technologies such as:

- Endpoint management

- Application packaging, provisioning and deployment

- Mobility support

- Cloud workspaces

- Leveraging virtual desktop and desktop as a service

- Device lifecycle management

- End user identity and access management.

Providers assessed in this space offer complete end-user computing (EUC) technology services that form the core of the digital workplace.

Eligibility criteria

- Provide endpoint management and endpoint security services, supporting a wide variety of endpoint management solutions, assisting clients with device policies including bring-your-own-device (BYOD), and mobility and expense management

- Provide complete device lifecycle management services, including support for device procurement, enrollment, app provisioning, support, management, disposal and recycling. Services should cover device sourcing and logistics, device as a service (DaaS) for device security, support for unified endpoint management (UEM) and mobility program management

- Demonstrate experience in providing remote virtual desktop services, both on-premises and in the cloud

- Manage devices in multiple, widespread locations Support end point security services by supporting technologies such as secure access service edge (SASE) and biometric authentication with a zero trust approach

- Offer services to support modern networks and unified communication (UC) as a foundation for a digital workplace

Digital Service Desk and Workplace Support Services

This quadrant assesses service providers that offer modernized support services, including workplace support, service desks, on-site/field support, tech bars and cafés, IT vending machines and automation-enabled omnichannel support for chat and voice. Their services provide the ability to work from anywhere/anytime; device support, including automated proactive technical support; and cloud platforms to provision always-on systems. They leverage digitally transformed services through AI and other cognitive technologies for end-user facing tasks and help achieve significant cost savings.

Eligibility criteria

- Ability to provide managed service desk and workplace support services through a hybrid workforce, including virtual agents

- Offer remote and onsite field support as well as in-person technical assistance, leveraging advanced technologies such as augmented reality/virtual reality (AR/VR)

- Set up and support self-help kiosks, tech-bars, cafés and IT vending machines

- Data-driven enriched analytics to support self-service, automatically resolve tickets and generate actionable insights among users

- Provide automated and contextualized support for end users, based on their roles and work

- Ability to quantify workplace support function performance beyond traditional service metrics

Managed Employee Experience Services

This quadrant assesses providers that offer value-added managed services not only for enabling the workplace technology ecosystem, but also for enhancing end-user experience. These providers typically deal with business leaders and line of business (LoB) representatives, in addition to CIOs. They offer services that associate employee experience with measurable business results. Their services help align the digital and physical facets of the future workplace with the human aspect.

Eligibility criteria

- Ability to provide services that directly correspond with user experience associated with device and app access, plus team collaboration, human augmentation with digital workers such as chatbots, LoB employee experience, user productivity and digital dexterity

- Offer a seamless experience for remote-working employees and part-time workers, as well as provide work-from-home support and innovative engagement services and solutions for the respective country or region

- Should have at least 50 percent clients leveraging experience level agreements (XLAs), related key performance indicators (KPIs) and at least 10 percent clients, globally, with XLA-based actual pricing (risk and reward) engagement

- Provide managed unified communications and collaboration (UCC), analysis of user behavior and measurement of user experience beyond workplace technology, extending smart workplace services to other business functions such as human resource outsourcing (HRO) and operations

- Offer workplace services that permeate businesses, including smart user and context-specific access through virtualized workspaces

- Offer smart facilities services and physical on-premises services that support capabilities such as hot desking, health assessment and customized and contextualized IoT supported workplaces

- Offer services to enhance employee digital dexterity and support technology democratization initiatives such as low-code/no code development

Quadrants by Region

Quadrants	U.S. Public Sector
Workplace Strategy Transformation Services	√
Managed Workplace Services – End User Technology	√
Digital Service Desk and Workplace Support Services	√
Managed Employee Experience Services	√

Schedule

The research phase falls in the period between **April and May 2022**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **September 2022**.

Milestones	Beginning	End
Launch	April 25, 2022	
Survey Phase	April 25, 2022	May 20, 2022
Sneak preview	July 2022	
Press release	September 2022	

Please refer to the link to view/download the ISG Provider Lens™ 2022 research agenda:

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

ISG Star of Excellence ™ – Call for Nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the "Voice of the Customer" concept. The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with ISG Provider Lens (IPL) studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: Star@isg-one.com

Research production disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

Partial list of companies being invited for the survey

Are you in the list or do you see your company as relevant provider that is missing in the list? Then feel free to contact us to ensure your active participation in the research phase.

42Gears	Deloitte	ManageEngine
Accenture	Digital Workplace Group	Matrix42
ActioNet	DXC	McKinsey
ASG	EY	Meta
Atos	Fujitsu	Micro Focus
BCG	GAVS	Microland
Bell Techlogix	General Dynamics	Microsoft
Birlasoft	Getronics	Mindtree
BlackBerry	Globant	NTT DATA
BMC	Google	Pomeroy
Capgemini	Happiest Minds	PwC
Capita	HCL	Red Thread
Capterra	Hexaware	TCS
CGI	HPE	Tech Mahindra
Citrix	IBM	Telia
Coforge	Infosys	Trianz
Cognizant	Insight	Unisys
Compucom	ITC Infotech	UST
Computacenter	Kaspersky	VMware
Connectis	KPMG	Wipro
CSS Corp	Kyndryl	YASH Technologies
Dell	Leidos	Zensar
	LTI	

Contacts for this study

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ISG Provider Lens QCRT Program Description

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context. In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's Quality & Consistency Review Team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- help define and validate quadrants and questionnaires,

- advise on service providers inclusion, participate in briefing calls,

- give their perspectives on service provider ratings and review report drafts.

The ISG Provider Lens QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for this study

Jim Kane
Director

Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.